
Attendees:

Kathy Saito

Tom Arnez

Laura Okawa

Chris Dunham

Cris Jensen

Linda Parr

Joan Gifford

Greg Thompson

# Introductions

- Discussion Leaders
  - Chris Dunham (EBT)
  - Cris Jensen (SAWS and CWS/CMS)
  - Linda Parr (WDTIP)
- What are your expectations for today?
- What have your experiences been?

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## Topics

- Stakeholder Identification
- Stakeholder Ownership
- Communication Strategies
- Balancing Different Cultures and Needs
- Wrap-up

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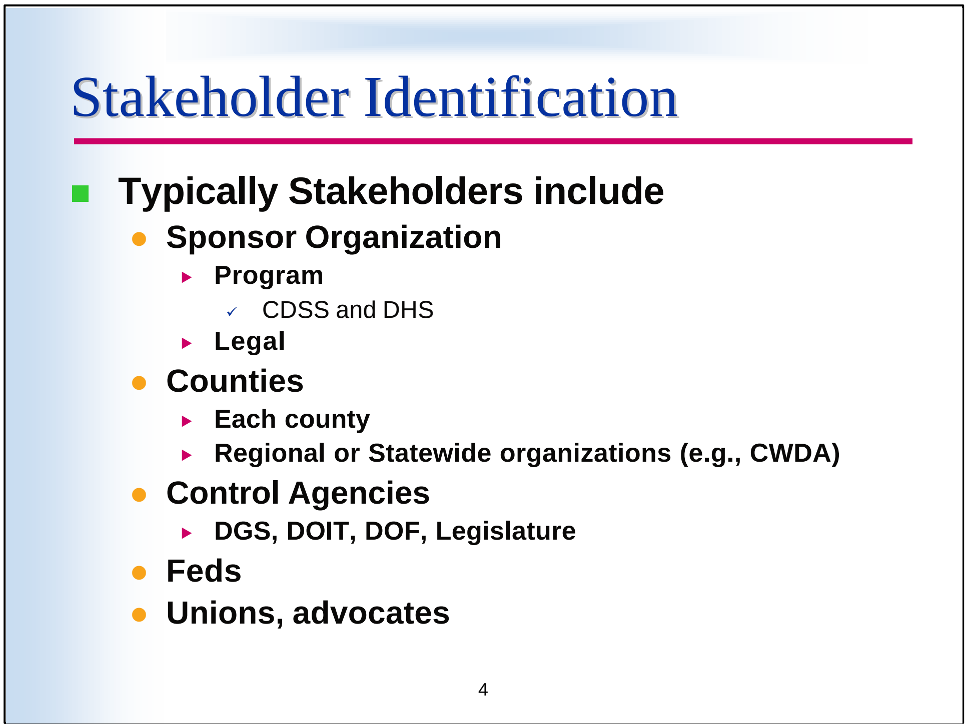


Also may include:

-Retailers

-Financial Institutions

-Media/PR representatives (not necessarily a stakeholder, but may have to deal with them as well)

-HHSDC itself, both the project(s) and the Cannery

-State Treasurer's Office

-State Controller's Office

-County Boards of Supervisors and CSAC (sp?)

-County Auditor/Controllers

## Stakeholder Identification

- **Each group has different needs and priorities, as well as decision making cultures**
  - **Determine how they make decisions**
    - **What is the style of decision making**
    - **Who has the ability to make decisions**
      - Consensus, highest manager, loudest player, etc.
  - **Determine how they do business**
    - **Delegate responsibility or keep at management level**
    - **"Cards-up" or "Cards-down" culture**
  - **Be sure when you need a decision you involve the parties who CAN make a decision**
    - **Particularly when it comes to big decisions like contract award**
    - **Determine what risks they are and are not willing to take**

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-Get to know each stakeholder group.

-Understand what drives them and what makes them tick.

-What are their top priorities and "hot buttons"

-Who oversees them and who do they oversee

-Who are they accountable to and how are they accountable

-Consider canceling meetings if not all appropriate parties are present. This usually ends up saving time (otherwise much time is spent reconstructing decisions and discussions). This can cause schedule delays, so use appropriately.

-Sometimes including specific names on the agenda can force their participation.

-Periodically revalidate each stakeholders' level of participation. Especially when there is turnover/new participants joining the project.

-Are they getting the information they need

-Are you getting the information the project needs

-Don't forget to update the Communication Plan

-Some projects do daily/weekly web searches of various news agencies to determine if any of the stakeholders has been in the news. This can affect their interactions with the project based on stress and media focus, and can blur or obscure the real issue until the "heat" is off. (e.g., DOIT's recent BSA report and Oracle contracting articles may increase scrutiny of all State projects).

## Stakeholder Ownership

- **Determine who has ownership of each issue, requirement, etc.**
  - **Ensure consequences of delayed decisions are clearly communicated**
  - **Clearly indicate when the project is NOT the decision maker**
- **Determine expectations**
  - **Projects usually provide advice, strategies, pros/cons and impacts and may make recommendations**
  - **Sponsor/Stakeholders need to make decisions in a reasonable time**

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-Linda's example of not making policy/program decisions for CDSS. SID provides project management services to CDSS, but is not qualified or authorized to make policy decisions.

> -CDSS must be responsible for overall program results
>
> -CDSS usually establishes the MOUs with counties and thus they must lead or help coordinate interactions with the counties.

-Sometimes it helps to approach an issue from another part of the organization if you are at an impasse.


-Chris’ example of describing terms, concepts to retailers. Commercial folks are unfamiliar with the State’s models and timelines. Must use plain English and explain concepts and rationales for approach so they understand some of the project’s constraints.

-Linda’s example of CDSS and tables. “Table” did not convey to the reviewers the interaction of the data and the formulas being presented. Linda did not confirm expertise level of reviewers to ensure they understood the nature and importance of a timely review of the table. Since they did not understand what was being asked, they did not respond in a timely fashion and thus project delays were introduced.


-When considering the timing of communications also consider the sensitivity and need-to-know of the participants. Too soon and too late are equally bad as too much.

-Add and maintain a glossary and acronym list in the charter (or as a stand-alone which is attached to the charter) and Roles and Responsibilities document, and share this with stakeholders.

-Chris' example of preliminary interface specs: be sure you state the follow-up date and expectations/schedule for follow-on actions whenever dates, needed actions or information samples are provided.

## Communication Strategies

- **Keep stakeholders involved and engaged**
  - **Be sure to follow-up with ALL stakeholders on a regular basis**
  - **This can easily be a full-time job if you want to be effective**

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## Balancing Different Cultures/Needs

- When conflicts arise try to explain the context of each party's situation
  - If you can reach an understanding on why each party has their opinion, you can then start to build a resolution

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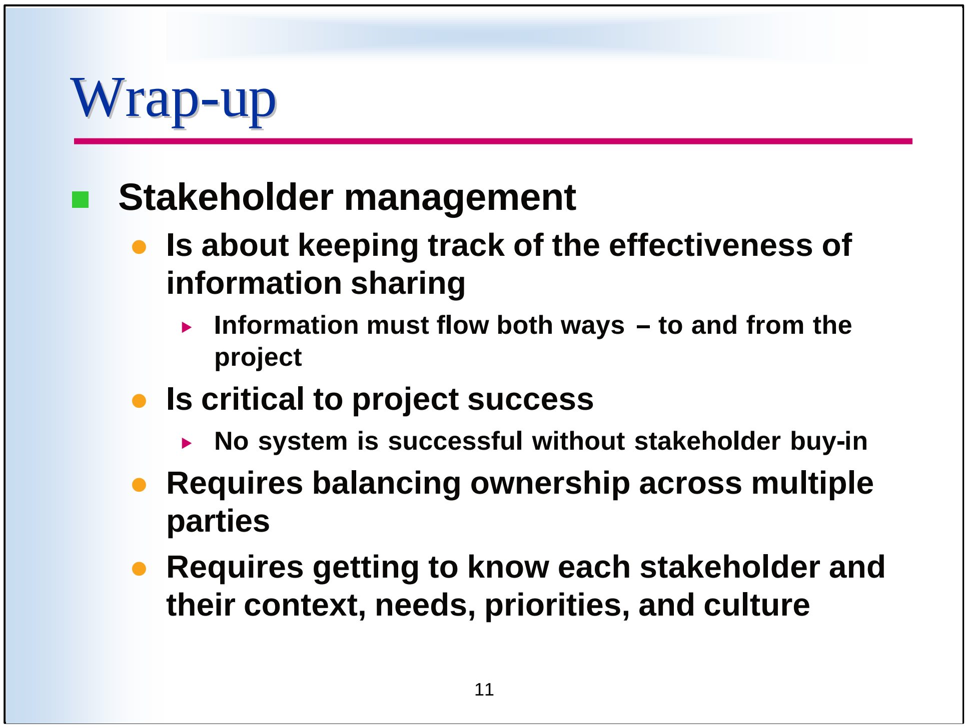


-Cris' "pulse" example/Linda's "sniffer" concept. Use the stakeholder contacts to get a feel for how the organization as a whole is feeling in general, as well as their attitudes towards the project. This may be difficult; some organizations are reluctant to tell you what they truly think. But communication must be a two-way street; they project needs to know if they are providing enough information or not.

-Pay attention to their moods and how they are interacting with you. Tactfully ferret out root causes of problems. Are they overworked, stressed, or hiding information because of internal problems or changes? Is the project exacerbating the problem or just a victim of the problems? Should the approach to dealing with the stakeholder change to address the current mood of the organization?

-Communications must be tailored and evaluated periodically to ensure both parties (project and stakeholders) needs are being adequately addressed.